



# Engagement review tool

Obtain client feedback as a method to improve, not only your client relationship, but to also improve your firm processes. This is an important step in finalizing the completion and delivery of your engagement. While an engagement review will be different for each engagement and each client, there are a few procedures you may wish to follow and several questions you may want to consider asking relative to each Trusted Client Adviser engagement.

## 1. Review with the client the [engagement action plan](#) that you developed to implement the engagement and get their feedback on both your processes and the engagement results.

Are you happy with the result of this engagement?

Did we meet your expectations?

What was the value that you gained from our service?

Do you see any possible revisions or updates that should be completed regarding this engagement?

How do you feel about the way this engagement progressed?

What parts of our process worked particularly well?

Where have we been less than proactive in addressing your concerns?

Based on our performance of this engagement, how likely are you to refer friends, family and colleagues to us?

Have I and others on our staff treated you with care, attention and courteousness?

How could we improve our service?

Is our billing clear? Do you feel that you are getting value for your money?

## 2. Review with the client the previously completed [Client goals and challenges worksheet](#) and the [Identify and prioritize tool](#) and prepare to discuss remaining issues that have not yet been addressed and determine the next steps in further assisting the client.

Is this still an accurate picture of the goals you would like to accomplish and the challenges you would like to address? If not, what needs to be added or removed?

Which of these goals and challenges can we help you address next?

What projects are important to you now and how can we help in assisting you to complete these projects?

## 3. If the current engagement is satisfactory to the client, continue the Trusted Client Adviser process for the next engagement!



Private Companies  
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